# *BassetPro*

*The Ultimate Bar Code Tracking System*

# Please Read This First!!

BassetPro is delivered with a blank database. If you are using this program for evaluation purposes, please see Appendix B to install the sample database.

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# *Introduction*

Thank you for choosing a SageData Solutions. By using **BassetPro**, we know that you will save time, money, and reduce administration overhead. Our programs are developed with the end users in mind, which can start using the system immediately, taking full advantage of its benefits. Our systems are intuitive and designed for a specific niche application. You receive a custom-tailored package, for the price of an "off-the-shelf" application.

The original BASSET program is in use by many different organizations all over the world. To develop BassetPro, we took the best traits from BASSET and incorporated features requested by users, resellers and potential users. BassetPro is Year 2000 compliant and network ready.

This manual should answer most of your questions about how to set up and operate the hardware and software for your BassetPro system. If it doesn't, please don't hesitate to contact me as indicated below.

We always welcome feedback, comments and suggestions from our customers. Fax them to me at (613) 225-8664, send an e-mail to nt@sage.ca or you can call me at (613) 225-4404.

*Nancy Tervo*

# Table of Contents

**INTRODUCTION** ..... **3**

**BASSETPRO - START TO FINISH** ..... **9**

**CHAPTER 1** ..... **13**

SETUP MENU ..... 15
*Setup Menu – Fields* ..... *16*
*Setup Menus* ..... *17*
*Setup Menu – Location* ..... *18*
*Setup Menu – Owner* ..... *19*
*Setup Menu - Bar Code* ..... *20*
*Setup Menu - Asset* ..... *21*
*Setup Menu - Handheld* ..... *22*
*Setup Menu - Communications* ..... *23*
*Setup Menu - Network* ..... *23*
*Setup - Printer* ..... *24*

**CHAPTER 2** ..... **25**

ACTION MENU ..... 27
*Audit by Location or Owner* ..... *27*
*Associate* ..... *28*
*Dispose/Un-Dispose* ..... *29*

**CHAPTER 3** ..... **33**

VIEW MENU ..... 33
*View Menu - Asset Detail* ..... *33*
*View Menu – Asset List* ..... *34*
*View Menu – View Bar Codes* ..... *34*
*View Menu - Transactions* ..... *34*
*View Menu – Transactions by Owner* ..... *35*
*View Menu - System Status* ..... *36*
*View Menu - Notes* ..... *36*
*View Menu – Location* ..... *37*

**CHAPTER 4** ..... **39**

REPORTS MENU ..... 41
*Reports - Assets* ..... *41*
*Report Menu - Missing Assets* ..... *42*
*Report Menu - Report of New Assets* ..... *42*
*Report Menu - Suppliers* ..... *43*
*Report Menu - Manufacturers* ..... *43*

*Report Menu - System Status* ..... *43*
*Sample Reports* ..... *45*
*Sample Reports* ..... *46*
*Sample Reports* ..... *47*

**CHAPTER 5 ..... 49**

FILE MENU ..... 51
*File Menu - Transfer* ..... *51*
*File Menu – Transfer – Download Options* ..... *52*
*File Menu - Export Data* ..... *53*
*File Menu - Import Data* ..... *53*
*File Menu - Import Data – View Structure – Basset 3.x* ..... *54*
*File Menu - Import Data – View Structure – Full Import* ..... *55*
*File Menu - Reindex* ..... *56*
*File Menu - Backup* ..... *56*
*File Menu - Exit* ..... *57*

**CHAPTER 6 ..... 59**

HELP MENU ..... 61
*About* ..... *61*

**CHAPTER 7 ..... 65**

HARDWARE SETUP ..... 67
*Workabout Computer* ..... *67*
*Batteries* ..... *67*
*Low Battery Warning* ..... *68*
*Automatic Switch Off* ..... *68*
*Troubleshooting* ..... *69*
RUNNING BASSETPRO ON THE WORKABOUT ..... 70
*Initial Set-up - Workabout* ..... *70*
*Main Menu - Handheld* ..... *78*

**CHAPTER 8 ..... 73**

FILE MENU - HANDHELD ..... 75

**CHAPTER 9 ..... 77**

ACTION - HANDHELD ..... 79
*Action Menu - Audit* ..... *79*
*Action Menu - Quick Audit* ..... *80*
*Action Menu – Audit by Owner* ..... *81*
*Action Menu - Notes* ..... *81*
*Action Menu – Missing Assets* ..... *81*
*Action Menu - View* ..... *81*

**CHAPTER 10 ..... 83**

Setup Menu ..... 85
*Short Code ..... 85*

**CHAPTER 11 ..... 87**

HELP - Handheld ..... 89
*Help Menu - Set Date/Time ..... 89*
*Help Menu - Scanner ..... 90*
*Help Menu - Format Data Disk ..... 90*

**APPENDIX A ..... 93**

Frequently Asked Questions ..... 95
*Communications / File Transfers not working: ..... 95*

**APPENDIX B ..... 97**

Instructions for importing evaluation database ..... 99

**APPENDIX C ..... 101**

New Features for BassetPro Version 3.3H ..... 103
*On the Handheld ..... 103*
*On the PC ..... 103*

# *BassetPro - Start to Finish*

Install BassetPro on your PC, by choosing "**RUN**" and entering a:setup. Double click on your BassetPro icon. You are brought to the Main Menu of BassetPro.

Next, under the Setup menu, enter your **Supplier, Owner, Manufacturer, Class** and **Model** fields.

Still within your Setup menu, cursor to Asset and enter all the pertinent information for your assets. (You can skip this step if you import your existing data or plan to capture your data on the handheld).

Insert your BassetPro program disk (128K SSD) into the bottom slot (B) of the Workabout and your data disk into the top slot. Close the Disk/Battery drawer.

Start BassetPro by pressing the **PSION+CTRL+DEL** keys simultaneously. BassetPro will load automatically.

Ensure that the Workabout screen is displaying the current date and time. If not, cursor to **Help – Set Date/Time** and make the necessary changes.

Cursor to **Scanner Type** and select **T** for **Tethered** (2-piece system) or **I** for **Integrated** (1-piece system). NOTE: the integrated Wand is treated as a tethered scanner.

In the **Action** Menu, use the arrow keys to go to **Audit**, scan in your Location bar code and then your Asset bar codes, entering the information requested.

Under the **File** Menu, select **Communication Mode** so that the Workabout is in Ready mode. Connect your Workabout to your PC either with a cable or put it in the docking station.

On the desktop, select **File – Transfer – Upload from Handheld**.

**Always ensure your time is correct on the Workabout as the system uses this date automatically and it is crucial to the accuracy and integrity of your data!**

# *Part 1*

*BassetPro on the P.C.*

# Chapter 1

## Overview: the Setup Menu

In this chapter we will cover the Setup Menu and how you can use it to maximize BassetPro's potential on your PC.

In this menu you can setup:

- Assets
- Locations
- Suppliers
- Owners
- Manufacturers
- Models
- Short Codes
- Class

In the Setup Menu you can also choose the settings for:

- What type of Handheld you are using
- Which communications port you are using on your PC
- The path on your network where your BassetPro data is stored
- Your printer settings
- Changing the names of your fields and labels to better reflect your organization.

# Chapter 1

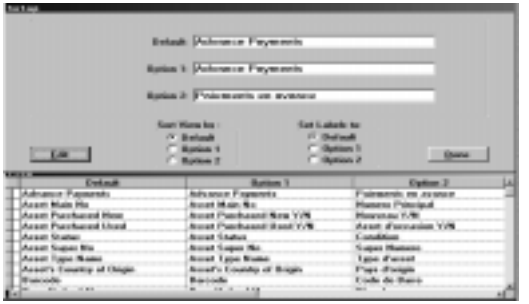
# SETUP MENU

The **SETUP** Menu is where you lay the groundwork for your asset information database.

You can opt to retain the default field names. If this is the case, continue with your set-up starting with Location (only if you are using only the PC program, as typically you would set-up the Locations using the handheld).

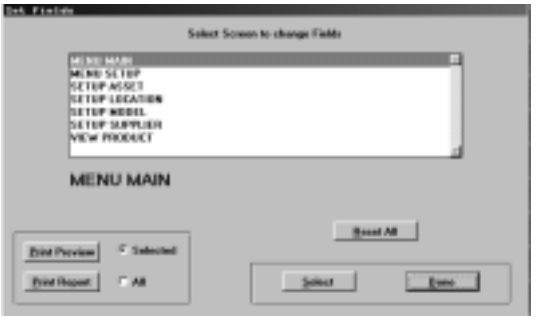
If you wish to customize the field names to suit your working environment, cursor down to "**Label Global"**. You only have to change these field labels once and the change is reflected in the whole system, including the Handheld.

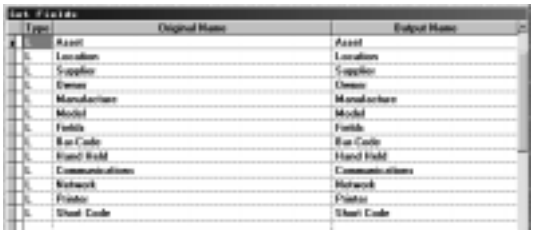
The screen display below illustrates how you can use two languages and you can "**Set**" the labels for the original ones or Option 1 or 2. Note that whatever you choose, these titles will be downloaded to the handheld.



## Setup Menu – Fields

Highlight the screen you wish to customize and click on **Select**. Only the first three choices are currently activated – Menu Main, Menu Setup and Setup Asset.



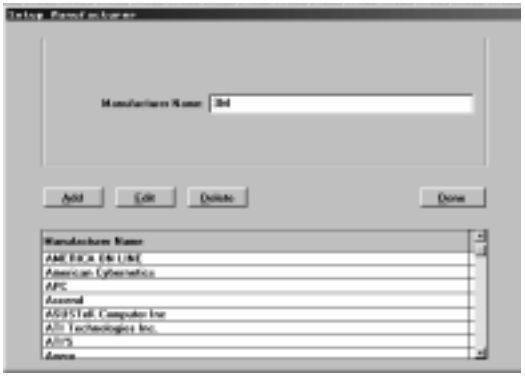

In the **Output Name** column, **double-click** on the field name you wish to change. (Note that each of these fields have a 40-character maximum.) Make your change, **Enter** and **ESC** back to your **Set Fields** Sub Menu. You will be asked to restart BassetPro (only if you change a **MENU** item). To restart BassetPro, click on the **Exit** button within the **File** menu. This will end your BassetPro session. Reload BassetPro simply by double clicking on your program icon.

**Note:** ☜
The field labels setup under "Label Global" overrides anything that you do in this setup section.

If you want to convert your changed field name(s) back to the default(s), from your Main Menu select Setup, Fields and **Reset All**. Again, the system will request that you restart BassetPro for the changes to take effect.

## Setup Menus

Input the information for the following fields: Supplier, Manufacturer, Model, Short Code and Class. Note that the Setup screens are very similar for all five fields. Only one will be described in detail.

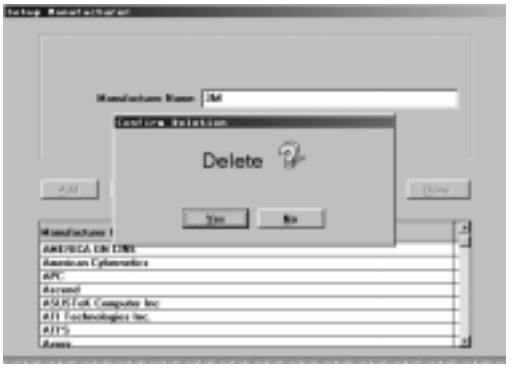



In the screen's lower portion, all entries previously made are displayed. In the middle portion of the screen, you can choose to **Add**, **Edit** or **Delete** entries.

In the to portion of the screen the item you have selected from your list will appear.

**Add**
To add a item, click on **Add**. Now click on **Save**. Repeat this procedure for the remaining item you wish to add to your list

**Delete**
When you need to delete an entry, click on the field to select it and then click on **Delete.** You will be prompted to ensure you wish to delete that item.




Edit

To **Edit** an entry, select an entry from the bottom portion of your screen, click on **Edit**, make your changes and then click on **Save**.

## Setup Menu – Location

In Setup Location you can Add, Edit, and, Delete items as you could in the previous setup screens. Unique to Setup Location is the capability of establishing a location hierarchy.

To select a parent for your selected location click edit and click find in the parent description section of the screen. You will then be prompt to enter either a barcode or description clue.

Once you have typed the desired clue click find, the location you requested will appear in the parent description field.

## Setup Menu – Owner

In the Setup Owner screen you have option to setup owners with or without barcodes. As in Setup Location you can Add, Edit or Delete information about your owners. Information such as, department, address, telephone number can also be added in the fields provided.

**Note:** ☜
In most cases when you setup owner barcodes it is because you want to track your assets by who has them, not where they are.

# Setup Menu - Bar Code

**Scan** or key in your bar code number and ensure that you have selected the correct **"Type".** Click on **Continue Setup**.
If the bar code is recognized by the system as already in use, this information is displayed in the upper right corner of the screen. Wait a few seconds, the screen will clear and your cursor will be positioned back in the field awaiting a new number.

**Click** on the information you want the bar code to reference.

# Setup Menu - Asset

Start by **scanning** or keying in the **Asset Bar Code Number**. Enter all the pertinent information for your asset on the screen. Press **Tab** to move to the next field. In fields with a drop-down box, you can move quickly to your choice by pressing the first letter of the name that you are searching for. For example, pressing the “h” key to find Hewlett Packard.

If the information you require is not in one of the pop up menus on this screen you can click the little box to the left of the field name and add it to your list.

When you have completed your entry, choose one of the options at the bottom of your screen; **More (to enter SAP information), Save/Next, Save/Exit or Exit. Exit will <u>not</u> save your current entry or changes.** If you enter a bar code for a previously entered asset, its information will be displayed and you can edit this information. If you wish to discard all of your entered information, click on the **Clear** button.

### Clone an Asset

When you have a number of identical items, like 12 boardroom chairs you only need to enter the first chair's information a quick way to enter repetitive information is to clone the information. Enter the information for the first asset, then click **Clone Product**. The background of the screen will change to indicate that you are in the clone product mode. In this mode, you only have to scan in the bar code label and enter/scan in the serial number if all else is the same. You are able to make changes to the other fields by clicking on them, but it is a fast and easy way to enter repetitive information.

### Setup Menu – Assets – MORE – SAP Fields

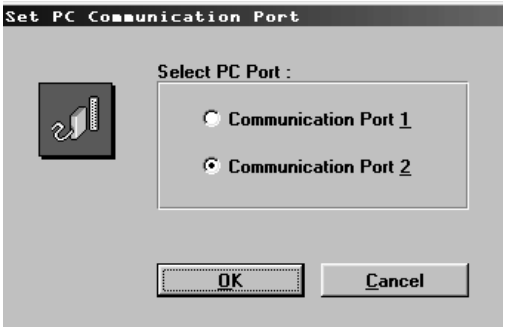
These extra screens were designed to enable you to input extra data that is necessary for importing your data to SAP.

## Setup Menu - Handheld

This setup option allows you to choose your specific handheld computer. **Click** on the handheld you are using and then on **OK**

## Setup Menu - Communications

This menu option allows you to set your communications port – 1 or 2. If you set COMM Port 1, but your data transfer does not appear to be working correctly, try Port 2.

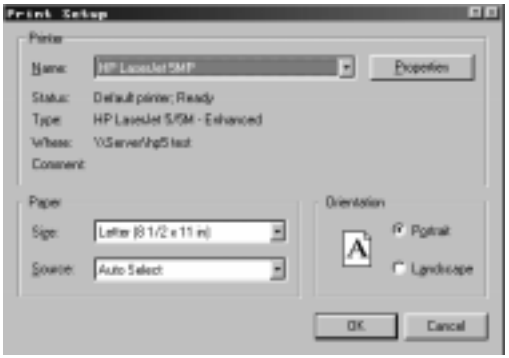



## Setup Menu - Network

This option lets you enter the path to where your database is stored

## Setup - Printer

Printer and printing options are set from this menu. Please note that your Windows printer settings will override these settings.



# Chapter 2

## Overview: Audit Menu

Chapter 2 explains the available features within the Action Menu on the PC.

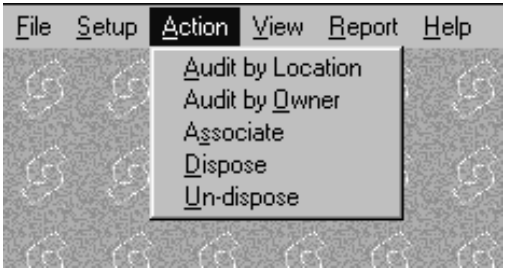
The following features are available within the Action Menu:

- Perform a physical Audit by a specific location
- Perform a physical Audit by a specific owner
- Associate more than one barcode to an asset
- Ability to Dispose and Un-dispose of an Asset from your "live" database

Each of these features will be described in greater detail throughout this chapter.

# Chapter 2

# ACTION MENU




## Audit by Location or Owner

The Audit function is a quick and easy way to keep track of your assets by a particular location or owner. Both screens look and operate the same except one tracks assets by owner and the other by location.

To start, **Scan** (or key) in your Location or Owner Bar Code and press the **Enter** key. Next, Scan (or key) in the **Asset bar code number** and press the **Enter** key. **Note:** the bottom left-hand corner of the screen with give you a message such as “asset was moved” or “asset audited.”

If you key in an incorrect or unknown bar code number, the system will warn you that “Bar Code xxx was not found!”.

The date and time stamp for that asset will automatically be updated to the current date and time. To do an audit from a new location or owner, just **scan** or key in the new **Location or Owner Bar Code**.

## Associate

Assets tracked by BassetPro can have their existing Old Asset, Bar Code or Serial Numbers “associated” with a new bar code number. This is typically used if existing data (via spreadsheet or ASCII Text import) is used and the items to be tracked do not have bar codes attached to them.

First, **key** or scan in your bar code number in the **New Bar Code** field. Next, find the asset you want to associate with this new bar code number. In search mode, select **Type of Clue** – either Non-Bar Code or Bar Code – and enter a search clue in **Asset Clue**. Now click on the **Find** box. You can cycle through the search results by clicking on Find Next. When

the asset is found, click on Associate (note the upper right-hand corner – Association was successful). You can now access that record by the new bar code number.

## Dispose/Un-Dispose

The Dispose feature allows you to take assets out of active use. Once an asset is disposed of it will not show up in reports and will not be downloaded to your handheld.

To dispose of an asset, go to the dispose screen, key in the barcode number, and click to dispose button in the bottom left hand corner of the screen. As a precaution the system will ask you if you are sure about disposing of your asset.

**Note:** ☜

*You can only dispose of **Asset barcodes**.*

*Owner, Location, Manufacturer and Supplier barcodes cannot be disposed.*

The Un-dispose screen looks and works the same as the dispose screen. Once you have un-disposed of your asset it will become active again and show up on reports and be downloaded on to your handheld.

# Chapter 3

## Overview: View Menu

This chapter provides information about the options available in the View Menu on the PC.

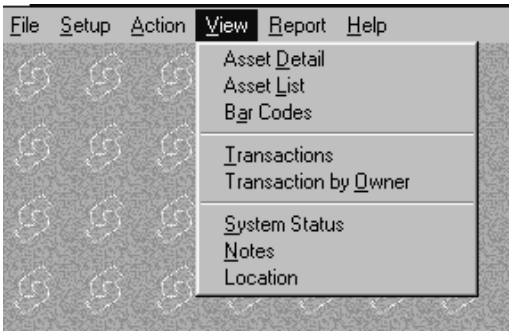
Although you can not make changes to the data within the View Menu it is a very valuable tool when used to review functions you have performed thus far.

Functions that can be viewed include:

- All information pertaining to a particular asset, with a search method, in case you are unsure of the barcode
- View, preview, and print various user-customized reports
- "One line-per-item" list of all barcodes within BassetPro
- Ability to view a complete transaction history of each asset
- A complete outline of your data base that can be viewed or printed
- All notes written on your assets, a very powerful for tracking maintenance history
- View your complete location hierarchy right down to the assets in your locations.

# Chapter 3

# VIEW MENU




## View Menu - Asset Detail

Asset Detail lets you search for a record by using the **Clue** function. If you enter an asset's number, you will go directly to the record. Or, you can type in a clue, (ie: computer) and press **Enter.** To see additional search results, click on **Find Next**. When you have completed your search, click on **Done** to return back to your Main Menu.

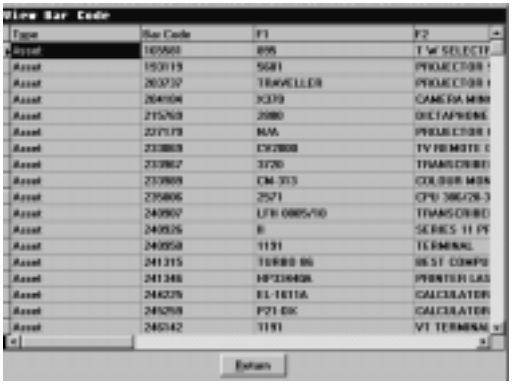
If you wish, you can enter a freeform note up to 100 characters, by clicking on **Write**. When your note is completed, click on **Attach**, then **Done**.

## View Menu – Asset List

Although this screen appears under the **VIEW menu** option, you can also print or export a report from this screen. You can choose to print or view **ALL your assets**, or only those associated with a particular **Owner, Location or Short Description.** You can also choose between a **Concise** (one line per asset) or a **Full** (more detail) report.

## View Menu – View Bar Codes

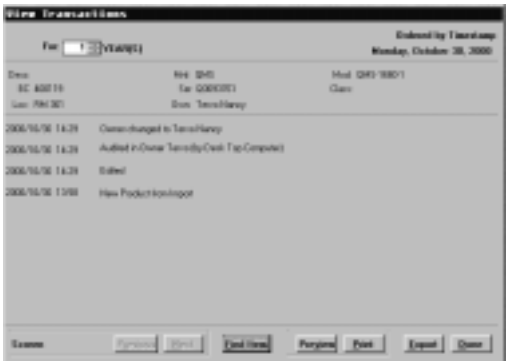
In viewing bar codes you can use the bottom and side scroll bars. Note that the bar codes are listed in numerical order, sorted by type: asset, location, manufacturer, owner or supplier.




## View Menu - Transactions

When opening View Transactions you will automatically see the last record that you were working on. Click on "Find Item", then either **scan** or key in the bar code number you wish to see the history of.

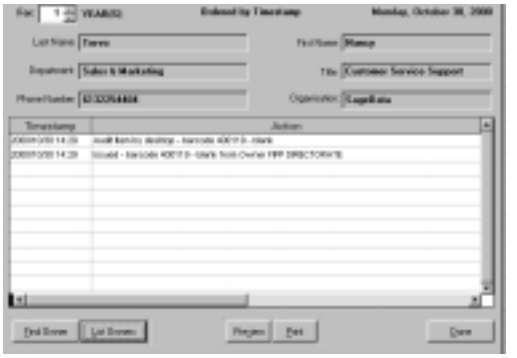
Item information is summarized at the top. History transactions include the date and time it was added to the database and when an asset was moved or audited. It will show you when and where the item was moved with the From and To location names.



## View Menu – Transactions by Owner

Transactions by Owner is similar to Transactions, but instead of displaying the history of a particular asset this feature displays history of a particular owner.

When you click List Owners the owner menu will appear. From this screen you can select an Owner and view the transaction history. You can also print or preview your selected owner's transactions.
This function is especially useful if you use Owner barcodes in place of Location barcodes.



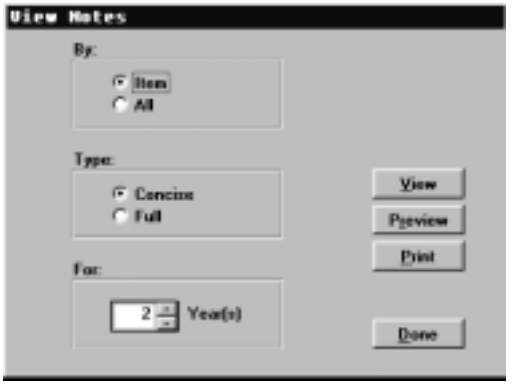
## View Menu - System Status

The System Status Report is described in the Report Menu section.

## View Menu - Notes

The **View Notes** feature is used to print or view notes written about your assets. One particular asset or all your assets notes can be viewed or printed from this screen. You can also select the number of years you want to view the notes on your assets.

For example, if you have been writing notes on a particular printer for five years but only want to view the notes for the past year select 1 year and the notes for the current year will appear.

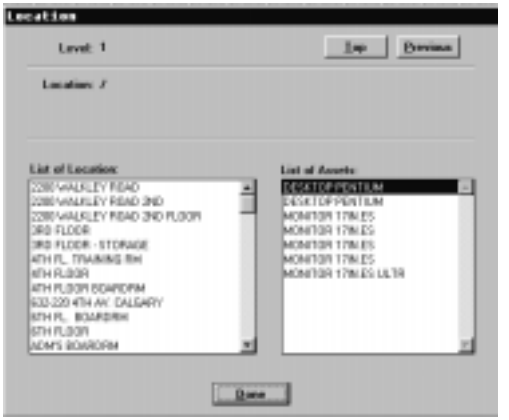


# View Menu – Location

The View Location screen is another place where the set up of your hierarchy can be viewed. On the 1st level of the hierarchy all locations that do not have a parent are listed.

To view assets or other locations that fall under a particular location, double-click your desired location or asset.

The locations and assets attached will appear, you can continue these steps until you reach the location or asset you wish to view.



# Chapter 4

# Overview: Reports Menu

Chapter 4 will describe the various reports you can generate through BassetPro. Each of the reports described can be viewed, previewed, or, printed.

The following reports can be requested from BassetPro:

- A full report of all assets within your “live” BassetPro database
- A report of all assets that are “missing” since your last physical inventory was taken
- Assets that have been added to the system since a specified date
- A complete list of all suppliers and manufacturers in your database
- A complete breakdown of your database including a dollar value of what your assets are worth

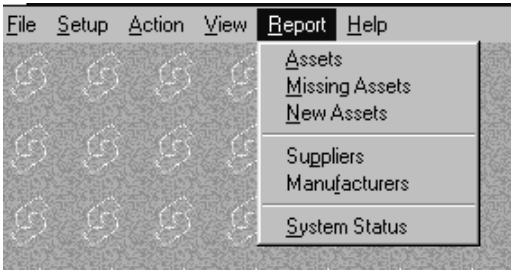
Each of these reports will be covered in more detail throughout this chapter. There is also sample reports included at the end of this chapter.

# Chapter 4

# REPORTS MENU

**NOTE:** ☜

*When you print, your settings from **SETUP Printer** will be in effect.*

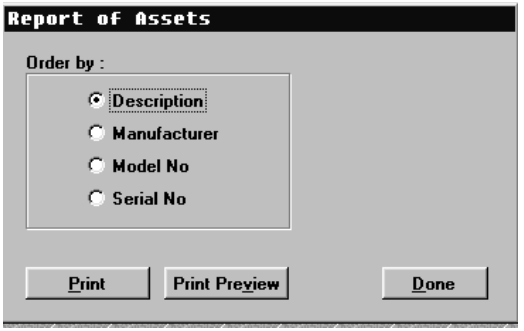



You can request reports of your Assets, Missing Assets, New Assets, Suppliers and Manufacturers, and the System Status, which is a summary report of your BassetPro data base.

In all **Report** operations, you have the option of Printing, Viewing, or Previewing your report.

## Reports - Assets

In your opening screen, you have the option to sort by Description, Manufacturer, Model Number or Serial Number. See the end of this chapter for sample reports.



## Report Menu - Missing Assets

Note that the default in **Deadline for Report** field is today's date and includes **ALL** assets whose time stamp is later than this date. A sample situation — suppose you started an inventory on September 15, ending on September 20th. You would enter the date as September 15, as any assets that had a date of September 14th or earlier would be labeled as "missing" as they weren't found during the inventory.

You can change the criteria by clicking on the **Deadline for Report** field. The date format is mm/dd/yy.

## Report Menu - Report of New Assets

You have the option of sorting your Report by **Bar Code, Description, Serial Number or Location**. The Starting Date defaults to today's date and includes ONLY those new assets added today. You have the option of keying in an alternative date in mm/dd/yy format.

If you select a date in the future, the following error message will be displayed (upper right-hand corner of screen):

## Report Menu - Suppliers

This menu choice lets you print off a list of suppliers held in your system.

## Report Menu - Manufacturers

This menu choice lets you print off a list of manufacturers held in your system. In the following Print Preview illustration, note that double columns have been used.

## Report Menu - System Status

The System Status Report is the window to the status of all asset/location information.

***SELECTIONS:***

**Use Previous Calculation**

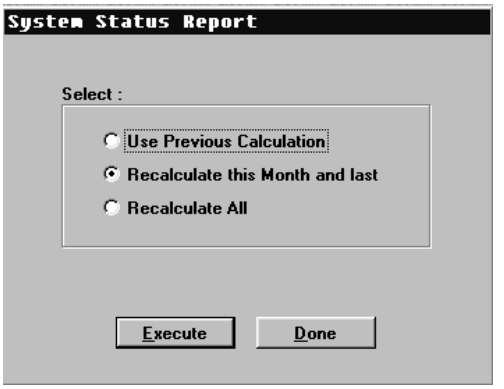
- generates a copy of the previous calculation of information held in your system

**Recalculate this Month and Last** -

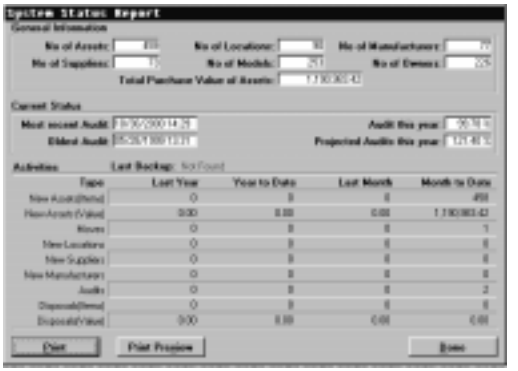
recalculates the information held in your system for the current and last month. (Does not recalculate for year to date.)

**Recalculate All** -

recalculates all information held in your system

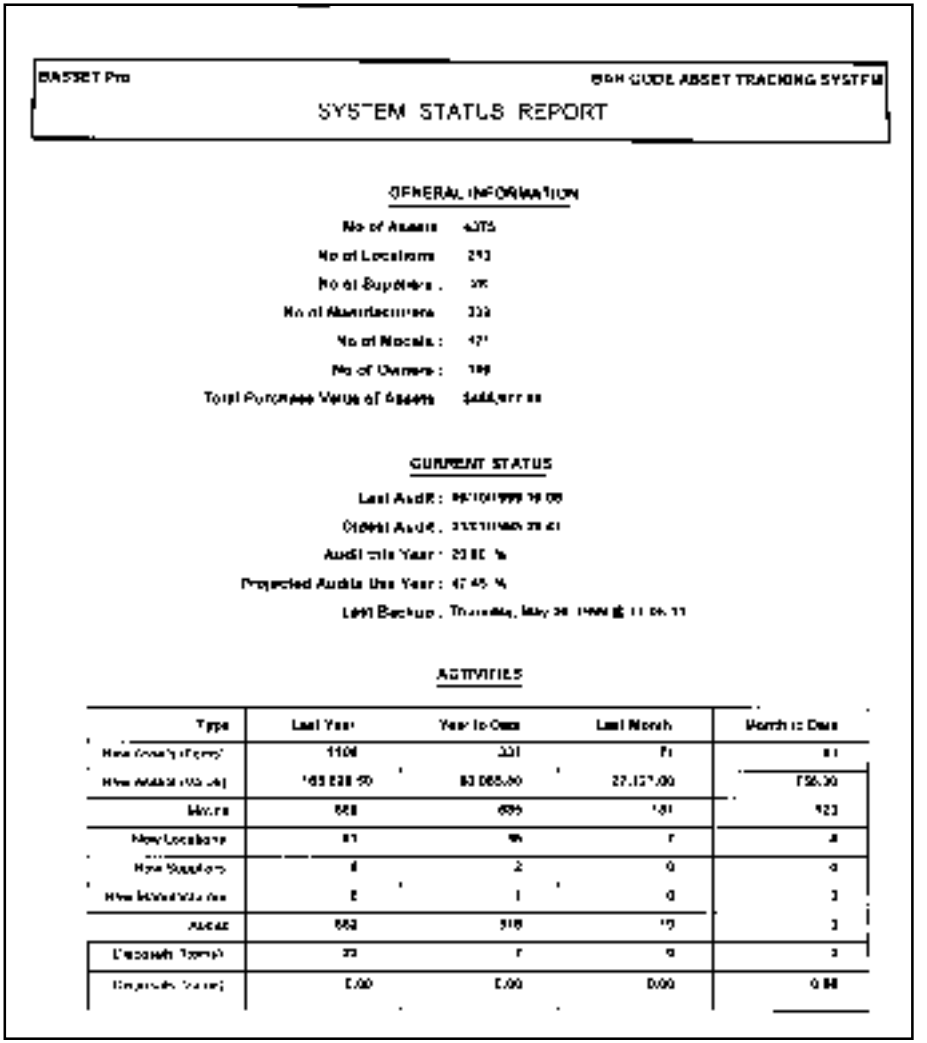



After using BassetPro for a while, you might accumulate thousands of pieces of equipment in your system and many transactions. BassetPro could take a few minutes to recalculate your system's statistics and gives you a message for you to confirm that you really want to do this.
The System Status Report is very useful for generating a quick "snap-shot" of the number and value of assets you have within BassetPro. It also shows you the number and value of assets disposed of. When you do a back-up of your BassetPro data the date of your last back-up will also be displayed in your System Status Report. You have the option to **Print** the report, or to **Preview** it on your screen display.



# Sample Reports

## System Status Report



BASSET Pro — BRH GUIDE ASSET TRACKING SYSTEM

SYSTEM STATUS REPORT

GENERAL INFORMATION

| | |
|---|---|
| No of Assets : | 4375 |
| No of Locations : | 253 |
| No of Suppliers : | 95 |
| No of Manufacturers : | 333 |
| No of Models : | 421 |
| No of Owners : | 199 |
| Total Purchase Value of Assets : | $444,xxx.xx |

CURRENT STATUS

| | |
|---|---|
| Last Audit : | 05/10/1999 19:08 |
| Oldest Audit : | xx/xx/xxxx xx:xx |
| Audits this Year : | 2180 % |
| Projected Audits this Year : | 4745 % |
| Last Backup : | Thursday, May 20 1999 @ 11:06:11 |

ACTIVITIES

| Type | Last Year | Year to Date | Last Month | Month to Date |
|---|---|---|---|---|
| New Asset(s) Entered | 1108 | 331 | 71 | 81 |
| New Asset(s) Value | $63,838.50 | $3,065.00 | 27,157.00 | 756.00 |
| Moves | 558 | 699 | 181 | 123 |
| New Locations | 81 | 96 | 7 | 8 |
| New Suppliers | 8 | 2 | 0 | 0 |
| New Manufacturers | 5 | 1 | 0 | 0 |
| Audits | 552 | 518 | 17 | 3 |
| Disposals Entered | 33 | 7 | 0 | 3 |
| Disposals Value | 0.00 | 0.00 | 0.00 | 0.00 |

Date: 05/10/1999 — Page 1

# Sample Reports - Asset Report



BASSET Pro

ORDER BY DESCRIPTION

REPORT OF ASSETS

BAR CODED ASSET TRACKING SYSTEM

| Asset Description | Manufacturer | Model No | Serial No | Bar Code | Location | Owner | Item Money |
|---|---|---|---|---|---|---|---|
| [illegible] | [illegible] | [illegible] | [illegible] | [illegible] | [illegible] | [illegible] | [illegible] |
| [illegible] | [illegible] | [illegible] | [illegible] | [illegible] | [illegible] | [illegible] | [illegible] |
| [illegible] | [illegible] | [illegible] | [illegible] | [illegible] | [illegible] | [illegible] | [illegible] |
| [illegible] | [illegible] | [illegible] | [illegible] | [illegible] | [illegible] | [illegible] | [illegible] |
| [illegible] | [illegible] | [illegible] | [illegible] | [illegible] | [illegible] | [illegible] | [illegible] |
| [illegible] | [illegible] | [illegible] | [illegible] | [illegible] | [illegible] | [illegible] | [illegible] |
| [illegible] | [illegible] | [illegible] | [illegible] | [illegible] | [illegible] | [illegible] | [illegible] |
| [illegible] | [illegible] | [illegible] | [illegible] | [illegible] | [illegible] | [illegible] | [illegible] |
| [illegible] | [illegible] | [illegible] | [illegible] | [illegible] | [illegible] | [illegible] | [illegible] |
| [illegible] | [illegible] | [illegible] | [illegible] | [illegible] | [illegible] | [illegible] | [illegible] |
| [illegible] | [illegible] | [illegible] | [illegible] | [illegible] | [illegible] | [illegible] | [illegible] |
| [illegible] | [illegible] | [illegible] | [illegible] | [illegible] | [illegible] | [illegible] | [illegible] |

# Sample Reports - Missing Asset Report

# Chapter 5

## Overview: File Menu

The File Menu on the PC has a variety of functions that you will use on a day-to-day basis when performing your asset management. Chapter 5 will describe the various functions in greater detail.

The following functions can be performed through the File Menu:

- Preparing your PC for communications with your Handheld
- Exporting and importing data to and from various formats including spreadsheets, ASCII and SAP.
- Reindex all files and data within BassetPro
- Perform back up of your BassetPro data, just in case!

Each of these functions will be explained in more detail throughout this chapter.

# Chapter 5

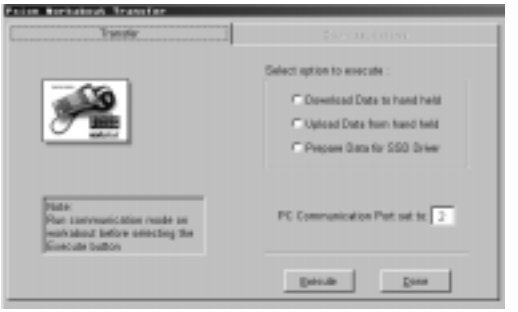
# FILE MENU

## File Menu - Transfer

Choose this option to transfer your data between your PC and handheld computer.

**Note:** ☜

Only the following fields are downloaded to the handheld: Asset Bar Code Number, Short Description, Serial Number, Location, Model, Manufacturer, Comments, Cost, Purchase Date, Class, Collator and Owner.



**Note:** ☜

If you see retries in the bottom left-hand side of your PC screen, the connection between your Handheld and PC has failed. Click **ESC**, check your Comm Port setting, and try again

On your Psion handheld, load BassetPro, select **Communications Mode** and press **Enter**. The Workabout screen indicates that the "Workabout is Ready". From your desktop, click on **Download to Handheld**. The transfer is complete when indicated on your screen. From this screen, you also have the option to **Upload from Handheld.** The procedure is the same.

## File Menu – Transfer – Download Options

When Downloading to your Psion Workabout you can select several options. You may be performing an inventory on assets that have a large dollar value and don't want to download all of your small items (this is very handy when you have a big database.) From the Download Options screen you can select a value limit and BassetPro will only download assets from your database that have a specified dollar value and higher. You may also require a particular location in your database on your Psion Handheld. Through the Download Options you can select as many locations you want to send to your handheld. By downloading by location you will still download all of your assets from your database but you will only download the specified location barcodes.

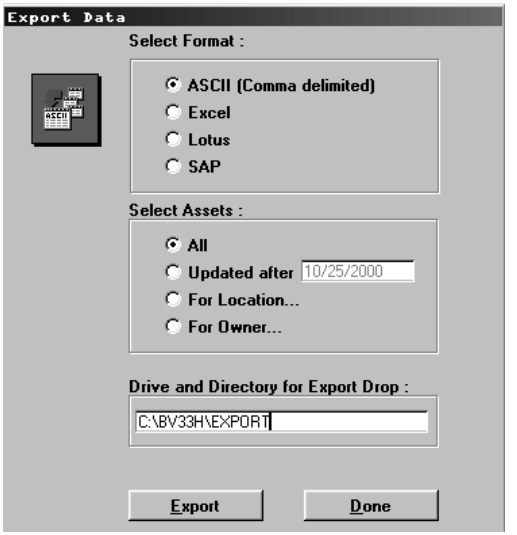
Each of these options can be used on they're own or together. For example you may be interested in two locations in your database and in those locations you only want to audit assets that have a dollar value of $1000.00 or more.

## File Menu - Export Data

Here you can export all your data or a partial selection based on the date, location or owner fields. You can select what format you want your data to be exported in, the file name and directory as well.

## File Menu - Import Data

You choose one of three import formats: Full Import, Basset 3.x or SAP. Use the one that is most appropriate for your situation.



The **Import File Structure** can be viewed by clicking on the "View Structure" button and printing it out for future reference. You can import existing databases by way of an ASCII text file, spreadsheet or SAP format. Make your selection as appropriate – either ASCII or spreadsheet, and if you want to **Add (append)** the data to your database, or **Refresh – which overwrites your current database with new data – use with caution!!! Please Note: When setting up your data's structure the puchase date format should be mm/dd/yyyy.**

## File Menu - Import Data – View Structure – Basset 3.x

**Note:** ☜
If you are going from BassetPro (version 3.x) to BassetPro, Quantity, Section and Active Fields are not imported. If you want to retain these fields, move their information to another field, e.g. Building and then rename the field (in Setup – Fields). Fields 18, 19, 20 are consoli-dated into the Location Description.

The following details the file structure of the data to be imported:

| Col | Name | Type | Width |
|---|---|---|---|
| A | ASSET BAR CODE | Character | 20 |
| B | LOCATION | Character | 20 |
| C | QUANTITY | Numeric | 5 |
| D | OLD_ASSET NUMBER | Character | 8 |
| E | SECTION | Character | 20 |
| F | DESC1 | Character | 25 |
| G | DESC2 | Character | 20 |
| H | MODEL NUMBER | Character | 10 |
| I | MANUFACTURER | Character | 20 |
| J | SERIAL NUMBER | Character | 20 |
| K | COMMENTS | Character | 20 |
| L | COST | Numeric | 10 |
| M | DATE PURCHASED | Date | 8 |
| N | CLASS | Character | 2 |
| O | ACTIVE/INACTIVE | Character | 1 |
| P | COLLATOR CODE | Character | 4 |
| Q | TIME STAMP | Character | 10 |
| R | BUILDING | Character | 20 |
| S | FLOOR | Character | 10 |
| T | ROOM | Character | 10 |
| U | SUPPLIER | Character | 30 |
| V | OWNER | Character | 30 |
| W | WARRANTY DATE | Date | 8 |
| X | DEPRECIATION CODE | Character | 1 |
| Y | CONTRACT NUMBER | Character | 20 |
| Z | P.O. NUMBER | Character | 20 |
| | ** Total ** | | 373 |

# File Menu - Import Data – View Structure – Full Import

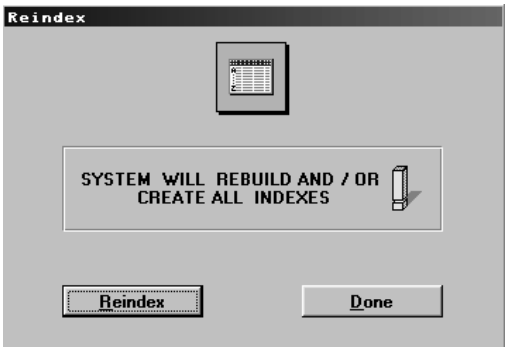
The following details the file structure of the data to be imported:

| | Field Name | Type | Width | Dec | Index | Collate |
|---|---|---|---|---|---|---|
| A | Asset Barcode1 | Character | 20 | | | |
| B | Asset Barcode2 | Character | 20 | | | |
| C | Old_Asset Number | Character | 20 | | | |
| D | Desc. Short | Character | 20 | | | |
| E | Desc. Full | Character | 100 | | | |
| F | Serial_Number | Character | 20 | | | |
| G | Comments | Character | 30 | | | |
| H | Cost | Numeric | 10 | 2 | | |
| I | Purchase Date | Date | 8 | | | |
| J | Class | Character | 10 | | | |
| K | Status | Character | 1 | | | |
| L | Collator Code | Character | 4 | | | |
| M | Depreciation Code | Character | 1 | | | |
| N | Warranty Date | Date | 8 | | | |
| O | Contract Number | Character | 20 | | | |
| P | P.O. Number | Character | 20 | | | |
| Q | Time Stamp | Character | 16 | | | |
| R | Manufacturer BC1 | Character | 20 | | | |
| S | Manufacturer BC2 | Character | 20 | | | |
| T | Manufacturer Code | Character | 2 | | | |
| U | Manufacturer Desc | Character | 30 | | | |
| V | Model BC1 | Character | 20 | | | |
| W | Model BC2 | Character | 20 | | | |
| X | Model Code | Character | 2 | | | |
| Y | Model Desc. | Character | 30 | | | |
| Z | Supplier BC1 | Character | 20 | | | |
| AA | Supplier BC2 | Character | 20 | | | |
| AB | Supplier Code | Character | 2 | | | |
| AC | Supplier Desc. | Character | 30 | | | |
| AD | Location BC1 | Character | 20 | | | |
| AE | Location BC2 | Character | 20 | | | |
| AF | Location Code | Character | 2 | | | |
| AG | Location Desc. | Character | 30 | | | |
| AH | Owner BC1 | Character | 20 | | | |
| AI | Owner BC2 | Character | 20 | | | |
| AJ | Owner Code | Character | 2 | | | |
| AK | Owner Desc. | Character | 30 | | | |
| | ** Total ** | | 689 | | | |

## File Menu - Reindex

The Re-index feature is used as a “housekeeping” tool. It is suggested that if you system crashes or you import a new database you should perform the reindexing function.

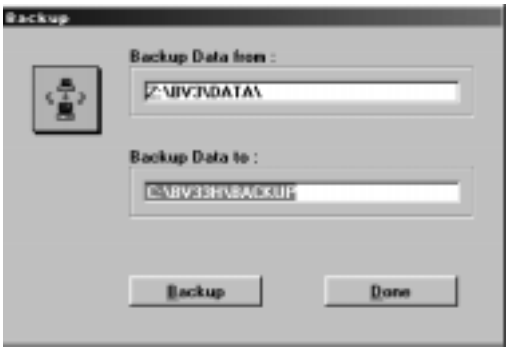
**Note:**
If BassetPro is being used by multiple users, then ensure that users are not accessing the data before performing the reindex.




To use this tool, click on the reindex button. When reindexing has been completed the system will prompt you to press any button to continue.

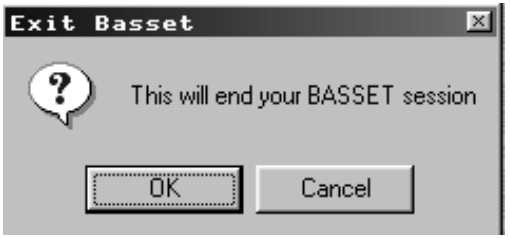
## File Menu - Backup

This function allows you to make a backup copy of your main data base. **This is recommended that you do on a daily basis**. In addition, you might want to have a copy on disk off-site or in a safe storage place.
To restore your files, you have to manually copy the files from the backup sub-directory to your BassetPro data directory and then run Re-Index from the File menu.



## File Menu - Exit

Exit will end your BassetPro session.  You have the option to cancel this action and return to your Main Menu screen.




The Help Menu is currently used to give system information. You may find

# Chapter 6

## Overview: Help Menu

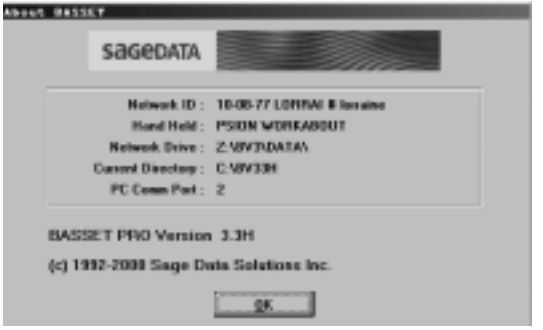
this information helpful when you are looking for your network ID or wondering what version of BassetPro you are using.

# Chapter 6

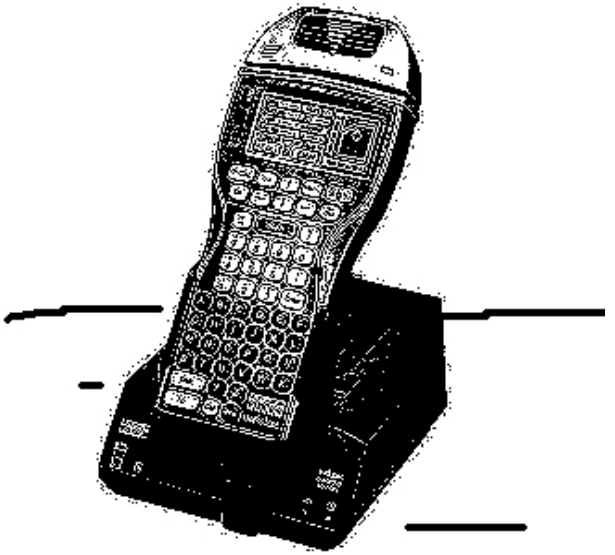
# HELP MENU

## About

System summary information is shown as indicated below. It will display how your BassetPro program is setup. That is, where your data is stored, which communications port you are using, your Network ID and what version of BassetPro you are running.



# *Part 2*



*BassetPro on the Handheld*

# Chapter 7

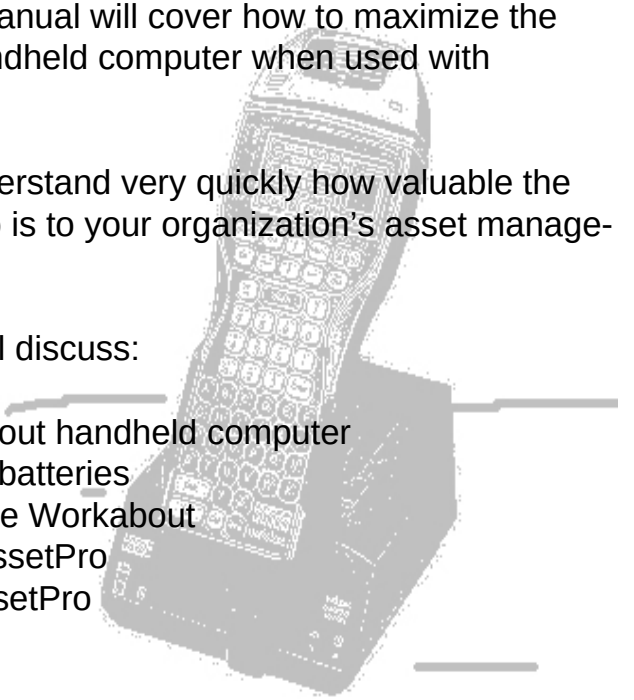
## Overview: Handheld Computers

This section of the manual will cover how to maximize the efficiency of your handheld computer when used with BassetPro.

You will come to understand very quickly how valuable the mobility of BassetPro is to your organization's asset management.

In this chapter we will discuss:

- The Psion Workabout handheld computer
- Main and back-up batteries
- Troubleshooting the Workabout
- Initial setup for BassetPro
- Main Menu of BassetPro



# Chapter 7

# HARDWARE SETUP

The PSION Workabout handheld computer will be illustrated in this portion of the manual.

## Workabout Computer

The Workabout is a robust handheld computer, ideal for mobile use outside of an office. It is dust proof and splash proof. Should you ever need to clean it, first turn it off and then gently wipe the keyboard and screen with a soft, clean, dry cloth.

## Batteries

By pushing the Disk/Battery Drawer Release Button (upper left hand corner), the top part of the Workabout will “pop” out and you can slide in your program and data disks. Two AA alkaline batteries can be inserted in the battery component.

You can use ordinary rechargeable batteries or a special PSION battery pack.

**Note:** ☜
On the MX Workabout the Disk/Battery Drawer Release Button is on the back of the handheld (upper left hand corner).

If you use standard Ni-Cad rechargeable batteries and not the PSION Workabout rechargeable battery packs, you cannot recharge them while they are in the Workabout computer.

When changing the main batteries, the Workabout is powered by the lithium backup battery. If you remove both the lithium and AA batteries at the same time, you will lose all the data stored in the main internal memory of the Workabout.

Information stored on your SSDs (solid state disk) do not need battery power to keep their contents safely stored, and have a shelf life of many years.

## Low Battery Warning

When the main batteries become low, a “Main battery is low” message is displayed on the bottom right-hand corner of the Workabout screen. With a low battery, the Workabout may have enough power to display information on the screen, or accept data that you have typed on the keyboard; however, it may **not** have enough power to save information or to scan in a bar code.

If you try to do something for which the Workabout does not have enough power, it will automatically switch off. No information will be lost, as the backup battery will maintain the information in the internal memory for several days. It is recommended that you change batteries as soon as possible after receiving a low battery warning.
**NOTE:**It is possible to damage the solid state data disk (SSD) and corrupt your data files if you attempt to save the information and the batteries are too low to write to flash. If you get this message, then turn the Workabout off and put in fresh batteries before attempting to go any further.

## Automatic Switch Off

The Workabout switches off automatically when it has been idle for a certain amount of time - normally five minute.

When the Workabout is turned off, no information is lost. When turned on again, you continue exactly where you left off, even if you were in the middle of an entry.

## Troubleshooting

If your Workabout seems to be malfunctioning, read the relevant sections below and carry out the recommended checks and corrective actions. If they don't solve your problem, contact your supplier.

**The Workabout Won't Turn On**
When you first switch on the Workabout, there may be a delay of a few seconds before any information is displayed. If the screen continues to remain blank, try pressing the Contrast key.
If this doesn't work, you will need to check that the Workabout is receiving power - make sure that the **charged** batteries are fitted correctly.

**Workabout Turns Off When You Scan An Asset**
This is usually an indication that the batteries are running low. Check your batteries and insert new ones if needed. This will typically happen with laser scanners when the batteries are running low.

**Scanner Won't Scan**
In the event the scanner will not read a bar code, check the Workabout to ensure you are in a BassetPro program module that is asking you to scan in a bar code.

**Workabout "locks up"**
If an application "crashes" (i.e. you get no response when you key information on your keyboard), you will need to reset the Workabout. Do this only when you have tried the previous troubleshooting suggestions. To reset the Workabout press the **PSION+CTRL+DEL** keys all at the same time. When you turn the Workabout on again, it will beep, briefly display the PSION logo screen and automatically start the BassetPro Program. If you were in the middle of an entry or transaction, it is possible that you may have lost that entry. Just go back and scan the location and asset bar code to ensure that the last changes had been saved.

**Data Transfer Isn't Working**
If you've tried to transfer data and the system is not responding properly,

check to make sure that the cable connecting the Workabout to the PC is attached to the RS-232 interface.

If this is not the problem, ensure that the cables are securely connected to their respective interfaces. On the PC, you can change the communications port under the “Setup - Communications” menu and see if this resolves your problem.

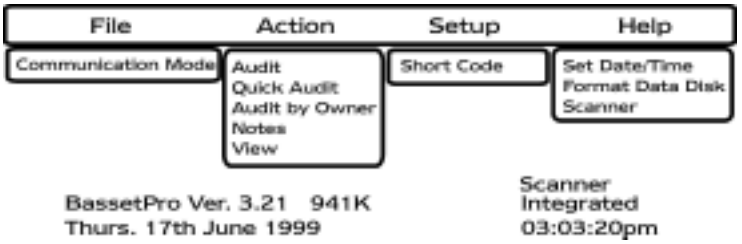
There can be an additional problem if your PC has an internal fax/modem. You may have to temporarily unplug your mouse and connect the communications cable to that interface on your PC.

# RUNNING BassetPro ON THE WORKABOUT

## Initial Set-up - Workabout

Insert the program disk in the bottom (B) slot of the Workabout and the data disk in the top slot (A). Press the following three keys simultaneously **PSION** + **CTRL+ DEL.** The Psion logo will fill the screen first, next the BassetPro intro screen and then your Main Menu.

### Main Menu - Handheld




Your Main Menu options are File, Action, Setup and Help. The bottom left of the screen indicates the program name and version and the date setting of the Workabout.

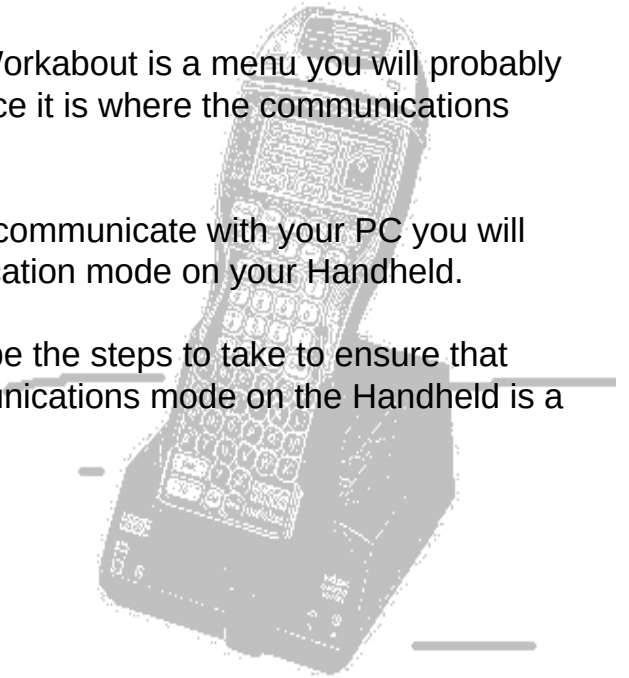
The bottom right of the screen indicates the room available on your SSD in 1,000s of characters (1941K means that you have 1,941,000 characters available on your data disk in the handheld).

**Important**

**To protect the integrity of your data, Always make sure that the date and time is correctly set!**

# Chapter 8

## Overview: Handheld - File menu



The File Menu on the Workabout is a menu you will probably use quite frequently since it is where the communications mode is.

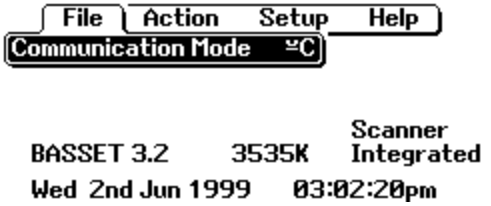
Whenever you need to communicate with your PC you will need to be in communication mode on your Handheld.

This chapter will describe the steps to take to ensure that every use of the communications mode on the Handheld is a successful one.

# Chapter 8

## FILE MENU - Handheld

In your File Menu, Communication Mode is highlighted. Press **Enter** and the screen will display the following message: “Communication Mode Workabout is Ready.” The Workabout is now ready to communicate with the desktop version of BassetPro.



# Chapter 9

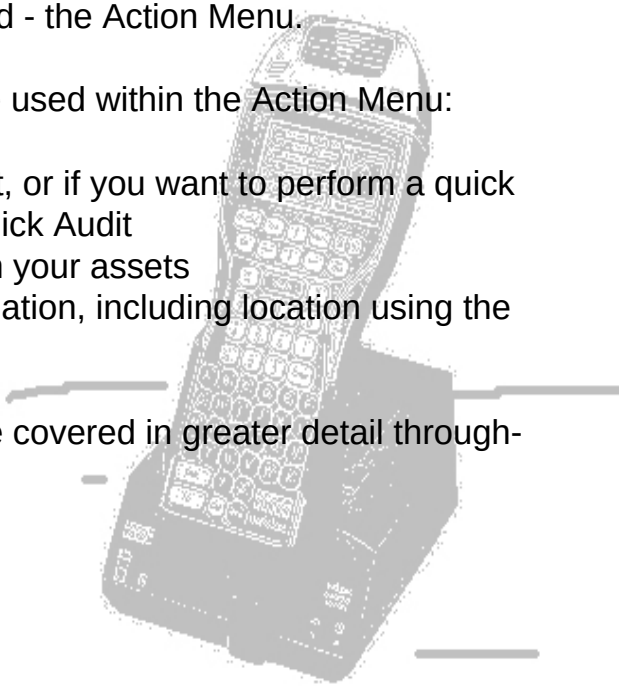
## Overview: Handheld - Action Menu

This chapter will cover the menu that is most used within BassetPro on the Handheld - the Action Menu.

The following tools can be used within the Action Menu:

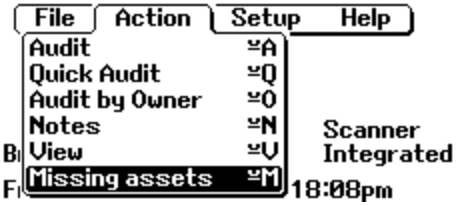
· Perform a physical Audit, or if you want to perform a quick check on your assets – Quick Audit
· Write and view Notes on your assets
· Verify your data's information, including location using the View function

All of these features will be covered in greater detail through-out this chapter



# Chapter 9

# ACTION - Handheld




## Action Menu - Audit

Audit and Quick Audit function basically in the same manner. Audit has the capability to Association, Edit and Add in new assets, locations, models, manufacturers, and owners.

If the bar code number is not found, you will have the option to **Add** it or **Associate** it with an existing record. When you choose **Add**, you then tell BassetPro if it is an **Asset** or **Location** bar code. When you add in a new asset you must press the **Menu** key and enter the Model, Manufacturer and Owner fields, to get a selection of previously entered items to choose from.

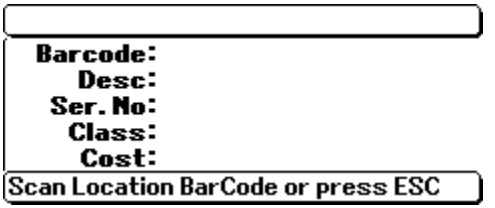
By entering the first letter of your Model, Manufacturer or Owner you will immediately go to the beginning of letter's section in the handheld. If you were looking for Hewlett Packard you would press the letter "H", then "E". At any time, you can use the up and down arrow keys to highlight your choice. You then press **Enter** to accept that choice.
If there is a Model, Manufacturer or Owner you need but it is not in your pre-set menus, you can add it by first pressing the **Menu** key then start keying in the information. A screen will pop-up saying item not found, press **Enter** to add, continue adding the information, then **Enter** again to save.

Pressing **Enter** takes you from field to field and **ESC** gives you the option to Save the information or to forget it.

If you choose the **Associate** feature, you can Associate a new bar code number with a previous bar code, serial number or old asset number. Press **Tab** to see your options and choose accordingly.

## Action Menu - Quick Audit

This feature is used to speed up the inventory process. Not all Audit features are available to the user. For example, you will not have the ability to Edit the asset information, or to Associate it with another tracking number (e.g. serial number).




Scan or key in the Location bar code. If you are using the keypad, key in the number and press Enter. If the bar code number is invalid, a message to that effect will appear on the screen. ESC and re-enter the number.

The description of the Location bar code will be indicated at the top of your screen and you will be asked for an asset bar code. Key or scan in the number. If the asset number you scanned is not registered to the Location bar code, a warning will be given. You now have the option to Ignore, or Move.

The situation where Ignore would be used — you are in the President's office and have completed your audit. You move to the Warehouse and start to audit. If you do not change the Location bar code to the Warehouse, you will be given the option to Move or Ignore. When you choose Ignore, you can **ESC** back to enter in the Warehouse Location bar code and then continue with your audit.

To move the asset, press **M** for Move. This will automatically create a transaction record (see **View Menu – Transactions** for an example). When you have completed your audit, press **ESC** to go back to the Main Menu.

## Action Menu – Audit by Owner

If you have assigned barcodes to owners within your database this function will allow you to perform an inventory by a particular owner. The screen works and looks the same as Audit, the only difference is Audit uses location barcodes and Audit by Owner uses owner barcodes.

## Action Menu - Notes

Notes allows you to type in a 100 character message and attach it to an asset. You can enter and view notes exactly as you would in the desktop version.

## Action Menu – Missing Assets

The missing assets function on the Psion handheld is a quick and easy way to check a location you have just audited for asset you may have missed.

By scanning the location you wish to check for missing items the system will provide you with a list of items that were in that location the during the previous audit but were not scanned this time. For example, if you are auditing an office that had a printer in it the last time you performed an inventory and it was not scanned this time the Missing Assets function will tell you a printer is missing.

## Action Menu - View

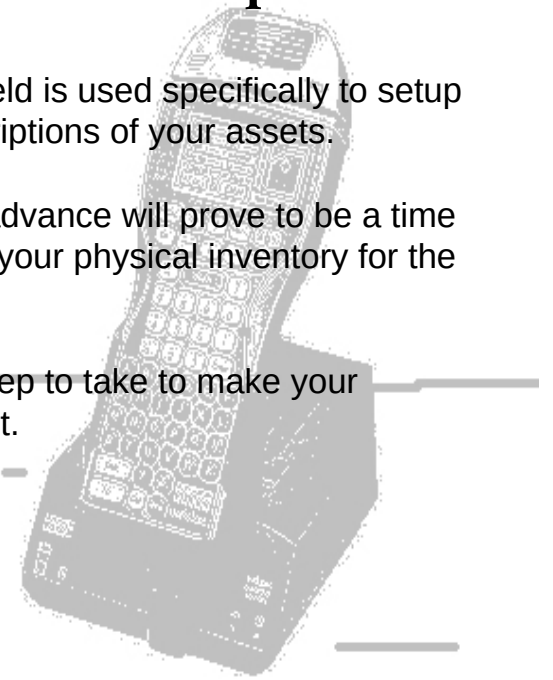
**Note:** ☜

No changes can be made in this screen as it is a view screen only.

This options allows you to scan an asset and see all the information that you would see in the Audit or Audit by Owner screen, PLUS, the last location the item was inventoried in and the last date and time the asset was scanned.

# Chapter 10

## Overview: Handheld - Set-up Menu



The Setup Menu on the Handheld is used specifically to setup short codes for your short descriptions of your assets.

Setting up your short codes in advance will prove to be a time saving step when your perform your physical inventory for the first time.

This chapter will describe the step to take to make your BassetPro system more efficient.

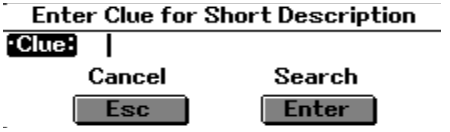
# Chapter 10

# Setup Menu

## Short Code

Short codes are valuable in reducing the amount of keystrokes you need to used when entering data for your assets.

Enter a clue, or the short code, for the description you are looking for and press **Enter** to search.




If the short code is already in the system it will appear, if not you can input the description you want assigned to that short code. Press Enter to save or Esc to cancel.

**Note:** ☜

If there is a short code you want to delete, perform the same steps as outlined above and press Tab to delete to short code.

# Chapter 11

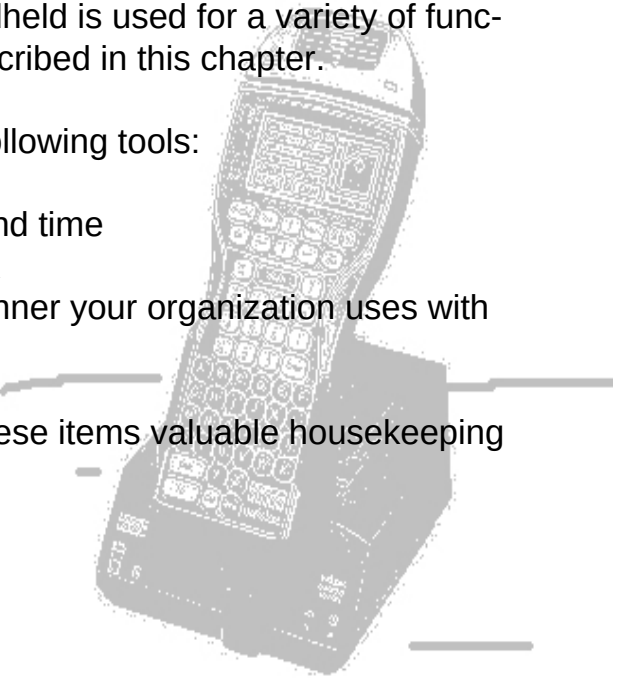
## Overview: Handheld- Help Menu

The Help Menu on the handheld is used for a variety of functions; each will each be described in this chapter.

The Help Menu offers the following tools:

- Setting the proper data and time
- Formatting your data disk
- Choosing the type of scanner your organization uses with BassetPro

We think you will each of these items valuable housekeeping tools to use with BassetPro.



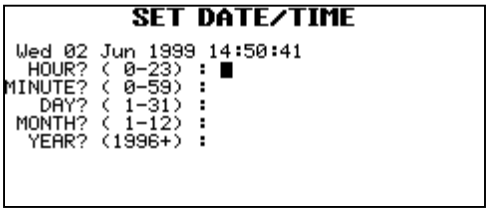
# HELP - Handheld

## Help Menu - Set Date/Time

Firstly, ensure that the Workabout's time and date setting is correct. You will see this at the bottom of your Main Menu.

If you want to make changes, cursor down to **Set Date/Time** and press the **Enter** key.

Press Y for **Yes** or N for **No**.




Your cursor will be blinking at the Hour Field. When you have entered the hour, press the Enter key. Continue down your options, pressing the Enter key to confirm your data.

When you have confirmed the Year field, BassetPro will indicate your choice with Press any key….(to continue). You will be returned to the Help Menu.

## Help Menu - Scanner

You must select the scanner being used, either **T** for Tethered (separate scanner attached to Workabout with a cable) or **I** for Integrated (Laser scanner only). One exception is for the Workabout **WAND**, choose T for Tethered.

Using your cursor keys, move to **Scanner**, and press the **Enter** Key.
Press T for Tethered, or I for Integrated.
You will be returned to the Main Menu.

## Help Menu - Format Data Disk

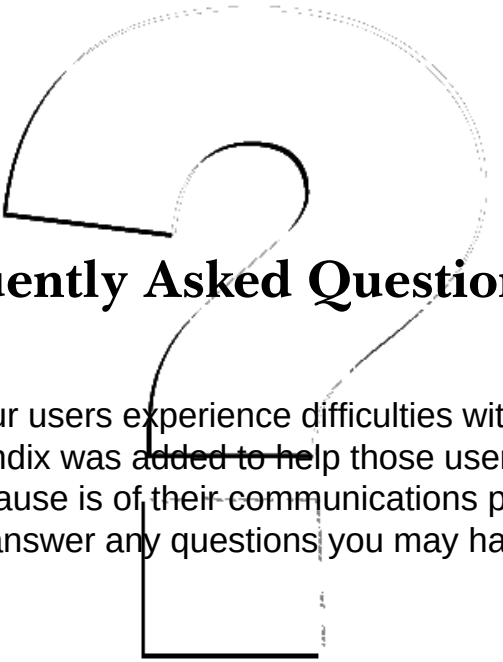
Your data disk stores all the data collected by the handheld through the Audit and Notes functions. When you have completed an audit with the handheld, you would upload this information to the main database being held on the desktop version of BassetPro. Depending on the number of assets you are working with, you may want to format the data disk following each audit.

You can check the bottom of the screen of the main menu to check how much free disk space you have on your data disk. If this is under 10K, then you will want to transfer all your data to your PC first, then format your disk.

**ALL DATA IS ERASED from your handheld after formatting the disk!**
By pressing Y for Yes, the formatting will be initiated. To cancel out this action, either press N for No, or ESC to return to the main menu.
The Main Menu of BassetPro shows you how many thousands of charac-

ters are available on your data disk.  If you notice that your BassetPro system is slowing down during an audit and you haven't formatted your disk in 1 – 2 months, it's advisable to transfer all your information to your PC, format the disk and then transfer the data back to the handheld.

# Appendix A



## Frequently Asked Questions

Many of our users experience difficulties with communications. This appendix was added to help those users troubleshoot what the cause is of their communications problems, and, to hopefully answer any questions you may have.

# Frequently Asked Questions

## Communications / File Transfers not working:

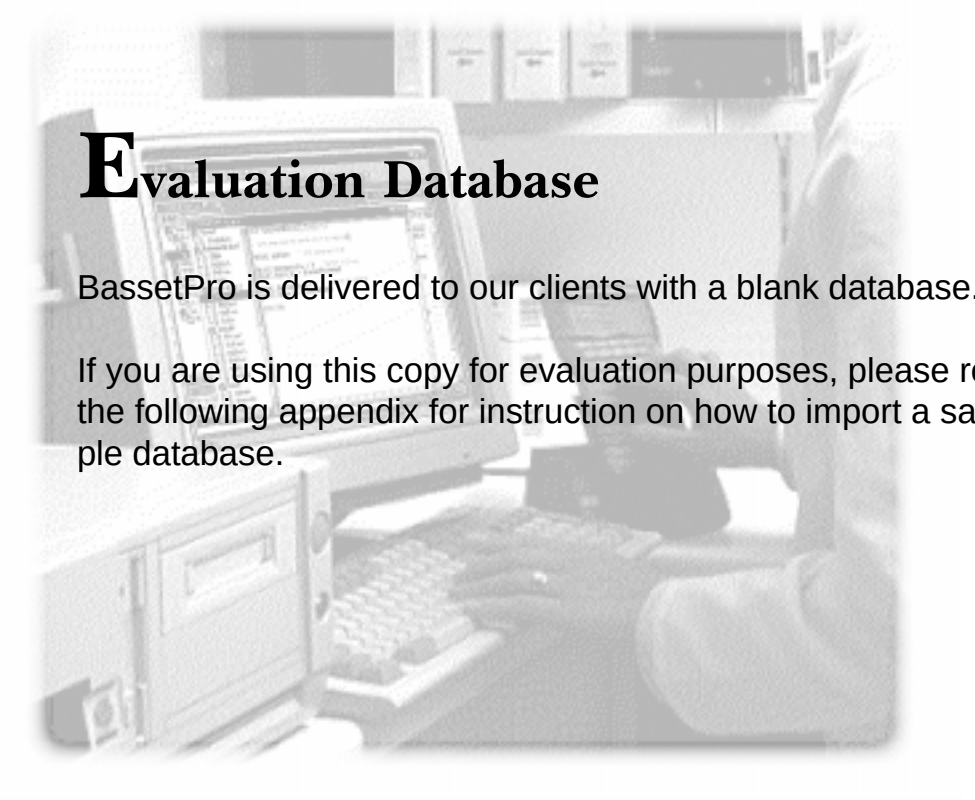
**Typically occurs when:**

a). Wrong comms port selected – try Comm 1 then Comm 2
b). **Comms port is faulty – try another PC built by another manufacturer** this is very very common, even one-way data comms is possible**
c). Serial cable used and not a NULL MODEM cable
d). Cable plugged into Bar Code Interface and not the RS-232
e). Older version of our software that does not run on new OVAL units
f). Internal Fax Modem and a Serial Mouse already on your PC – must disable mouse to enable communications. Better still, is to use a PC that doesn't have an internal modem.
g). Always have Workabout start communications FIRST!
h). Try re-booting Workabout – press PSION (È) + CTRL+DEL keys together. (PSION Key is bottom left-hand key)
i). Ensure that LINK is OFF from Workabout's System Screen .

**Configurations:**
Must have a separate data disk – we do not use internal memory due to support issues. A program disk comes with package.

Communications is the main problem that people have with our programs. Any other questions about the use of the program, can be easily answered by referencing the user manual index pages or by sending an e-mail to nt@sage.ca.

# Appendix B



## Evaluation Database

BassetPro is delivered to our clients with a blank database.

If you are using this copy for evaluation purposes, please read the following appendix for instruction on how to import a sample database.

# Appendix B

## INSTRUCTIONS FOR IMPORTING EVALUATION DATABASE

If you are using BassetPro for evaluation purposes, we have included a sample database for your convenience. To install this database, go to **File** and select **Import – Full Import.**

The screen shown above will then appear. At this point you will select ASCII as the format and Refresh as the update type. After clicking on **Import**, a warning screen will appear, click Continue. Once the Import is complete a message will appear in the top right hand corner of the screen. Press any key or click the mouse to continue. Click on Done. Congratulations, you should now have a sample database.

# Appendix C

## New Features

We, at SageData, are continuously striving to develop an asset management package with the end user in mind.

We take the input from our present and future clients and try to accommodate each organizations needs.

This appendix will cover all the recent changes to BassetPro on both the PC and the Handheld.

# Appendix C

# New Features for BassetPro Version 3.3H

## On the Handheld

**Missing Assets** – This function allows you check a particular location in your database for any assets you may have missed while performing an inventory. See page 88 for further information about this function.

## On the PC

**Setup Owner** – Setup Owner and Setup Owner Detail screens have been combined to simplify adding, editing and deleting owner information. List button added to make searching for an owner easier. See page 22 for more information.

**Setup Location** – Setup Location and Setup Location Detail screens have been combined to simplify adding, editing and deleting location information. List button added to make searching for a location easier. See page 21 for more information.

**Setup Asset** – Ability to add information to the six pop up menus on this screen. See page 24 for more details.

**Trasaction by Owner –** View and print transaction for a particular owner in your database. You are also give the option to select how many years back you want to view. See page 41 for more information.

**Full Report** – Information entered in the comments field of an asset now appears on reports if the information type “full” under View Asset List Screen is selected. See page 38 for more information.

**Download Options** – You can now choose to a particular dollar value or only certain locations when downloading from your PC to your Psion Workabout. See page 58 for more details.

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